

A Beginner's Primer for Data-Driven Advocacy:

Overall Objectives of this guide:

- To introduce the concept of advocacy
- To consider how advocacy can contribute to achieving the objectives of your organization
- To provide a practical introduction to some of the main keys to successful advocacy
- To understand how to begin to incorporate data into your advocacy strategy
- To learn ways to set objectives and monitor advocacy
- To prepare you to conceptualize your campaign before planning the details

Part 1: What is Advocacy?

Advocacy describes a method or approach used to:

- change policies and practices
- reform institutions
- alter power relations
- change attitudes and behaviors

Some Useful Definitions of Advocacy:

“Advocacy is putting a problem on the agenda, providing a solution to that problem and building support for acting on both the problem and the solution”.

“Advocacy is public support for or recommendation of a particular cause or policy”.

“The term advocacy encompasses a whole range of methods and approaches used to change those policies and practices, attitudes and behaviors that function as obstacles to development and poverty eradication. While technical support and the provision of services focus primarily on the manifestations of poverty, advocacy focuses on the causes of poverty and seeks change at this level”.

“Advocacy consists of actions designed to draw a community’s attention to an issue and to direct policy-makers to a solution. It consists of legal and political activities that influence the shape and practice of laws. Advocacy initiatives require organization, stra-

tegic thinking, information, communication, outreach and mobilization”.

“Advocacy can be defined as action aimed at changing the policies, position, and programs of governments, institutions or organizations involving an organized, systematic influencing process on matters of public interest. In addition, advocacy can be a social change process affecting attitudes, social relationships and power relations, which strengthens civil society and opens up democratic spaces”.

“Advocacy includes figuring out how bureaucracies and systems work, and fighting decisions that deny us things we are legally entitled to – protection from discrimination, access to social assistance and health care, fair treatment by the justice system, etc. Advocacy also includes lobbying organizations, institutions, and various levels of government to change their rules and regulations that deny people the full economic, political, and legal rights set out in the United Nations’ Universal Declaration of Human Rights”.

Why use advocacy?

- To achieve widespread, sustainable change
- To defend communities from adverse policy changes
- To strengthen civil society and expand democratic space by encouraging the participation of citizens in all levels of policy-making

Part 2: Setting the Scene for Advocacy & Other Important Considerations

Here are a few things to think about both at the beginning of your campaign and throughout its duration:

- Analyze the problem. Break down the issue into component parts and select the most strategic issue by exploring how the issue affects the people you are working with – what changes do they want or need?
- Clearly define what it is you want to see change. What solutions are being proposed by you and others?
- Understand policy making processes. How do issues get onto the policy making agenda?
- Analyze the decision-making space. Which institutions can make decisions regarding the issue?
- Identify your target audience. Who decides what and when?
- Think about the opportunities that exist to influence the issue.
- Who are your potential allies for this work? Prioritize amongst allies and network accordingly.
- Who are your potential opponents? What arguments will they make? How can these arguments be dealt with?
- Analyze your institutional capacity to undertake the advocacy, alongside the capacity of allies.
- Who will do what? When will human and financial resources be needed?

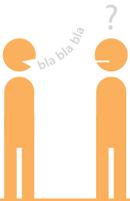
- Think about your strategy for influencing the primary and secondary targets. What components of the advocacy toolbox could you use – lobby meetings, seminars and conferences, policy briefings and research documentation, exposure visits, media coverage, etc.
- Estimate the costs involved and make a preliminary budget.
- Reflect on any changes in the local context, successes or failures of specific initiatives and overall advocacy strategy.
- And consider....When will your advocacy strategy be over? What happens if you have a success in changing policy? Will you engage in developing and implementing the policy with government?

A few of the Main Challenges of a Successful Advocate....

- Going from right to righteous, which can offend supporters.
- Wanting to win the battle in one step when experience shows the need for long term commitment
- Building communications initiatives based on assumptions, instead of data and well-researched information
- Thinking that the issues are too complex for simple, concise messages

Myth: Any communication is good communication.

Reality: The world is full of bad communications. Think of the last time you struggled to stay awake during a speech, gave up trying to decipher a policy paper, or had a misunderstanding with a friend. The most successful communications initiatives craft compelling messages for people identified as willing to hear them and respond.



Myth: Human beings respond better to rational arguments than emotional ones.

Reality: Campaigners often make the mistake of assuming that people will respond primarily to technical information. While highly complex and detailed information may be appropriate in some circumstances, there are many situations where you will reach people—even highly intellectual people—through their hearts and their emotions, not their heads. Private sector advertising has long been aware of this ‘secret’, which is why an ad for a new car will generally not explain all the wonderful technical aspects of the engine, but will make people feel prosperous, happy, safe and fulfilled if they drive it.



Myth: Telling people about how awful a situation is will compel them to take action.

Reality: As the 2004 tsunami showed, people do respond to the suffering of others. But messages that convey too much of a sense of fear and horror, especially about big problems such as poverty, can lead to feelings of apathy. Problems begin to seem so huge they cannot be solved anyway. Research also shows that people have problems imagining the consequences of issues that appear to be far removed—such as climate change—because human beings are not programmed to respond to threats that appear too vague or unconnected to their immediate daily lives. For these reasons, effective advocacy often stresses positive messages, and gives people a concrete sense of what they can do to take action.



Myth: Our issues are too complex.

Reality: No issue is too complex. Einstein was able to describe the theory of relativity in ways that can be presented in an introductory physics class. Complicated theories or situations may need to have their core messages distilled, depending on which audience you are trying to reach. This may require extra effort or creativity, or thinking outside the box. But it can be done.



Envisioning Key Issues & Asking Questions:

- What is your long term vision for your country or community?
- What do you want your country or community to be like?
- What needs to change for this to be achieved?
- What are the obstacles that stop this happening?
- What are you trying to achieve with your work?
- What contribution does this make to your overall vision?
- What else is there that you could do?

Setting Objectives for Advocacy:

Primary Objectives for Advocacy:

- Changes in laws and policies
- Implementation of laws and policies
- Reform of institutions
- Changes in attitudes and behaviors
- Increasing democratic space – legitimacy of civil groups, freedom of information and space to speak out
- Civil society gains – increased cooperation.

Secondary Objectives for Advocacy:

- Getting the issue on the agenda for public debate
- Increasing support and active membership
- Fundraising
- Developing the profile and reputation of your organization

Criteria for strategic issues

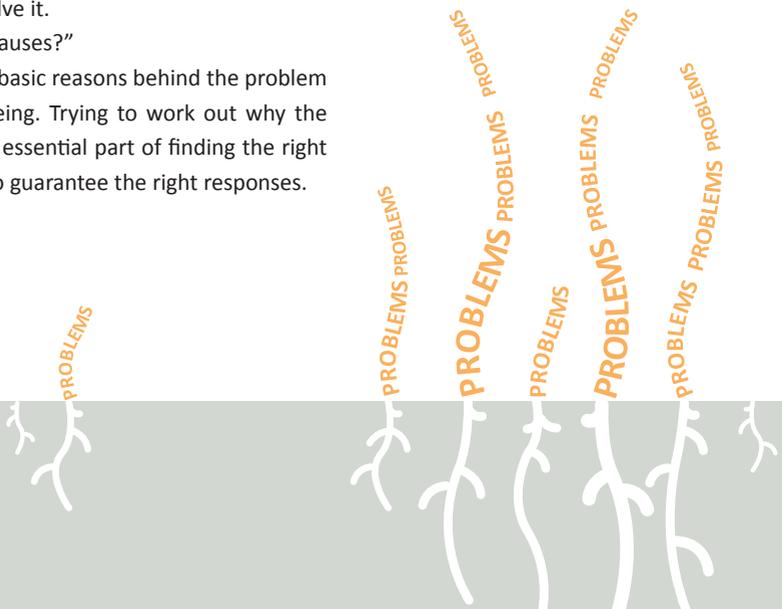
- Successfully addressing the issue will result in a real improvement in people's lives.
- The issue is important to your mission and stakeholders.
- The issue is consistent with your organizational priorities.
- It is a 'root' issue that will block progress on other problems if not addressed – but dealing with it successfully will unlock possibilities for other changes.
- The issue fits your expertise and experience.
- You know what it is you want to change, why it should change, and how it should change.
- There are opportunities/possibilities to make the changes needed.
- Your supporters and donors will support your work on the issue.
- The risks involved in addressing the issue are manageable.
- Your organization has a unique contribution to make and can bring added value.
- Work on the issue allows you to integrate project and advocacy work for greater impact.
- Change can be achieved using methods that you are comfortable with.

Problem and Issue Analysis – the “but why” technique:

Identifying the root cause of a problem will help you to figure out how to solve it.

But what are “root causes?”

Root causes are the basic reasons behind the problem or issue you are seeing. Trying to work out why the problem exists is an essential part of finding the right solution and helps to guarantee the right responses.



What is the “but why?” technique?

The “But why?” technique is one method used to identify underlying reasons or root causes that affect an issue. It examines a problem by asking questions to find out what caused it. Each time an answer is given, a follow-up “But why?” is asked. For example, if you say that people in poor communities don't have access to clean drinking water, you might ask yourself “but why?” Once you come up with an answer to that question, probe the answer with another “but why?”

Example:

The immediate problem: Children are not going to school.

Why? They keep falling ill.

Possible response: provide medicines.

Ask why? They drink bad water.

Possible response: dig a well.

Ask why? The well is too far from the school.

Possible response: put in a pipe.

Ask why? The local government said it would dig a new well last year but it hasn't.

Possible response: dig a well or lobby local government to provide the well.

Ask why? Central government has not released the funds they promised.

Possible response: dig a well/put in a pipe or lobby central government to release the funds.

Ask why? The bilateral donors haven't released the pledged aid funds.

question, until you reach the root of the problem, the root cause.

For example, does the problem start with lack of hygiene education resulting in people not caring about clean water, or is it because they don't know how to dig safe drinking water wells? Or is it a result of government's failure to implement well digging programs? If it is a government failure, why is this happening? Is it because of lack of money? Why is there a lack of money for drinking water wells?



Possible response: dig a well/put in a pipe or lobby bilateral donors.

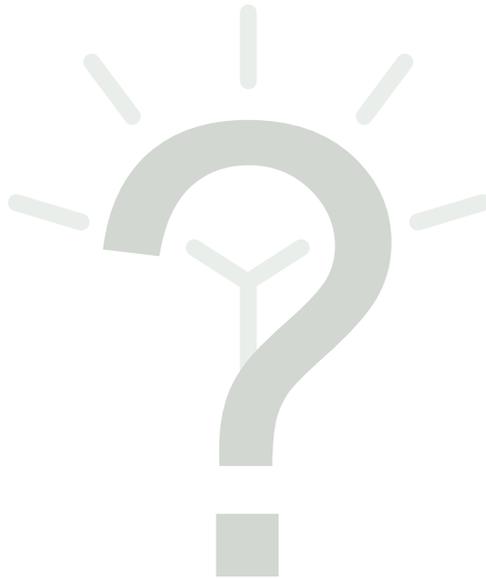
Many causes and solutions may apply to your problem, so it is up to you to find the ones that seem most important and that your organization has the capacity to work with. The “But why?” analysis by itself doesn't lead automatically to the area you should choose for your work, but it does highlight the different causes of the problem and the different paths you may take to solve it.

Why should you identify root causes?

Taking action without identifying what factors contribute to the problem can result in misdirected efforts. This wastes time and resources. It will uncover multiple solutions for a certain problem and allow the user to see alternatives that he or she might not

have seen before. It increases the chances of choosing the right solution, because many aspects of the problem are explored during the “But why?” exercise.

After the “but why”Information gathering.



Part 3: Using Data in your Advocacy Campaign

Once you have identified root causes you will need to complement your initial problem analysis with research into policies, case studies and useful facts that demonstrate why the change you are trying to realize is desirable and feasible. **This is where data comes in!!!**

Ask yourself: Do you have enough data to make an evidence-based argument to win?

Despite the fact that most arguments win by appealing to emotion, you still need to prove that the problem you are trying to solve ex-

ists and why implementing the change you are promoting is beneficial. The only way to prove that empirically is with data. It doesn't matter how right you are, your argument is irrelevant if you can't make it understood.

It is not always easy to present dense information in a way that is easy for others to understand, but it is essential to support your argument.

When deciding whether or not to include intellectual knowledge in your campaign – and, if so, what kind – consider the following:

- Does it already exist and do you have access to it?
- Do you have the resources to create it if it doesn't already exist?
- How will it advance what the audience already knows about the issue?
- Why will this information be credible to the target audiences?
- Is it user friendly?
- Will it cut through the noise? (All of the other information and distractions competing for your target audience's attention.)
- What do you expect this information to compel your targets to do?
- How long will this information remain relevant?
- How many different ways can you use this information in the campaign?
- Is it saying something new?

Research your issue extensively to get clear sense of the context into which you are launching your campaign.

Here are a few general sources of information and data:

- Recent media coverage on the issue and related issues (monitoring data)
- Publicly available opinion data (survey data)
- Materials from other organizations working in this space
- Press releases, speeches and public statements from elected leaders, corporate leaders, and other influential people (monitoring data)
- Interviews with well-informed stakeholders – ask them for their assessment
- Existing research data supporting your arguments (psychological, environmental, social science, pedagogical, etc.)
- Data that you've generated through surveys or screen scraping.

Some questions you may have to ask eventually:

1. What are the important indicators and how can they be made as robust as possible?
2. How can we create efficient feedback loops among researchers, advocates, and policymakers so that new insights routinely can be incorporated into data development?
3. How can we stop reinventing the wheel and draw on the rich body of scholarship to develop appropriate databases of information?

BEST PRACTICES

- Consider repackaging disparate information into one central place.
- Make the information as relevant to the target audiences as possible. For example: localize it, translate it into a different language, or include scientific data.
- Don't underestimate the power of a good executive summary – it may be the only thing people read.
- Create edible evidence – Bite-size chunks of information that tease and nudge people toward increased engagement and action.
- Make sure your information is newsworthy. Many members of your target audiences may not have an advanced degree on the topic. Write for a lay audience, or package the information differently for different audiences.

- Many people don't read footnotes.
- If you generate your own data, make it public, accessible, and usable. Ensure that the data you refer to is public, online, and in an accessible format for those people who want to learn more about the basis on which you're making your claims. You should also consider distributing it with an open license – you can retain copyright while making it clear that others can use it. While most audiences won't want to get into this level

of detail, it's critical for those who do want to engage more deeply with the issue, assess your argument, or build on your work. It also enhances your credibility.



Part 4: Beginning your Campaign

Overview of the nine stages of a campaign:

1. Confirm that a campaign is possible. Step back and assess the viability of a campaign. Can you be successful?
2. Set a clear, measurable goal that is achievable. Your plan needs to be focused on achieving a very specific goal. Your goal is your *raison d'être*. Are you trying to make something happen or stop something from happening?
3. Chart your course. Much like a road trip, there are likely many ways to get to your goal. You will use your knowledge of the field and the external environment to determine the best steps to your goal.
4. Anticipate conditions and understand the context. Visualize all possible scenarios – good and bad – so your plan includes strategies for leveraging opportunities and mitigating challenges, including identifying your opposition.
5. Know how to move forward. What will propel you down your path? What major campaign activities can help you get from Point A to Point B?
6. Prioritize your target audiences. Now that you have a strategy, stay focused by prioritizing who you need to engage to win, and when.
7. Put a public face on your campaign. Give the effort a name and a personality that is memorable and easily understood. You want people to recognize what you are about and not have to guess.
8. Operationalize your campaign. Based on the activities you think will help you move forward, determine which campaign tactics you will need: from intellectual knowledge to government relations to public mobilization to communications to coalition building to fundraising. This includes the datasets that you'll draw on to create your messaging and arguments.
9. Stay on track. Build evaluation mechanisms into your plan that will tell you when you are making progress and when you need to stop and make a mid-course correction. Meet regularly with your team to discuss your progress. Return to your data. It is the bedrock on which your arguments stand. If need be, don't be afraid to reanalyse and repurpose them.

Further details about these nine campaign stages will be provided in the next installment of our series of educational material for visualizing for data driven advocacy. In the meantime, here are a few basic things to think about before you get started:

Developing your message:

- What is the issue?
- Be explicit: Communicate one message only.
- Don't assume your audience knows anything about the issue.
- Keep it simple: All issues are complex but your campaign must not be. Complexity demotivates people, makes them confused and reduces their willingness to listen to what you are saying. A good picture is worth a thousand words.

What is a Message?

If you can't write your idea a post-it note, you don't have a clear idea.

A message is a concise and persuasive statement about your advocacy objective that captures:

- What you want to achieve
- Why you want to achieve it – positive or negative consequences of no action
- How you propose to achieve it
- What action you want taken by the audience

Messages should encapsulate everything you need to say – but they are not the same as slogans!

A good basic message:

- Can be tailored to fit specific audiences
- Uses clear, brief arguments that will persuade the audience
- Uses simple and unambiguous language that can be easily understood

Example of a good message:

If you find a fire:

- Raise the alarm
- Go immediately to a place of safety
- Call the fire brigade



Example of a bad message:

If you find a fire:

- Communicate with the immediate community in your building. Advise them of the situation. Make sure elderly people are aware of what is happening. Look for the nearest fire exit or other convenient way out of the building. Walk slowly and calmly towards it and make your way out.

Possible Target Audiences:

- ▶ Politicians and parties (elected, appointed) in formal government
- ▶ Civil servants
- ▶ Religious organizations and leaders
- ▶ Business associations and big companies
- ▶ Lawyers, judges, doctors, academics, teachers and other professionals
- ▶ Media - including television, radio, newspapers and magazines
- ▶ Trade unions and workers associations
- ▶ Women's groups
- ▶ NGOs and civil society organizations
- ▶ Regional institutions – EU, regional trade groups, etc.
- ▶ International institutions – World Bank/IMF, World Trade Organization, UN agencies, etc.

Lobbying your target audiences:

When you begin work on a new advocacy initiative, you will need to arrange a meeting with a person or institution that you don't know. Here are a few steps to help you ensure these meetings are successful:

Step One

Find out who is the right person in the organization or institution by:

- searching institutional websites, or
- asking alliance or network partners, or
- speak to advocacy colleagues in other agencies, or
- asking relevant friends

Step Two

Call them or their administrator/secretary/PA and:

- Say briefly who you are, what your organization does and why you would like to arrange a meeting with the decision-maker.
- The person will tell you whether you have approached the right person. If not, ask them to give you the name and contact of the person you should speak to.
- Be friendly and respectful whoever you are talking to – this person may be the key to getting access to higher level decision makers.

If you are given the appointment straight way, congratulate yourself and prepare for the meeting.

Step Three

If you are not able to arrange an appointment on the phone –write a brief letter (not an email) to the person outlining:

- Basic information about your organization or alliance
- Basic information about your advocacy issue and main concerns
- stating you would welcome a meeting to find out more about the decision-makers/institutions policy/thinking on the issue and discuss your concerns
- saying you would be pleased to invite them to your office, or to go to theirs

Wait two weeks. If you haven't heard anything, follow up with a phone call. Ask politely whether they have received your letter and whether an appointment would be possible, or if not, if there is someone else in the institution you could speak with.

Top Tips for Successful lobbying

PREPARE, PREPARE, PREPARE!

- Be clear about what you want
- Know the views of the people to be lobbied
- What's in it for them – why should they change their views

Part 5: Practicalities...

The Campaigning Toolkit

- Leaflets and other materials for public distribution
- Posters or advertisements
- Public meetings
- Media work – newspapers, radio or TV
- 'Stunts' or events to attract media attention
- Letter writing campaigns
- Petitions
- Competitions
- Mass lobbies, demonstrations
- Mass events – fasts, cycle rides, street theatre etc.
- Running an active website

Start to consider:

Are there any volunteers who could help you with campaign activities?

Establish a way of recording the names and addresses of campaign supporters.

If resources permit, provide them with feedback as the campaign progresses – this will maintain their enthusiasm and interest and allow you to call on them for further support in the future.

Campaigns are most successful when:

- The campaign is motivational, not educational
- The objectives resonate with the public (is widely felt, arouses emotion)
- Is winnable: objectives are realistic and achievable in a timeframe that works for you
- There is a clear and simple action that supporters can take
- Your whole organization is involved and actively engaged in the campaign
- The approach taken is creative and innovative but easily understood

- Supporters have the opportunity to be actively engaged in a range of activities
- The campaign is supported by wider alliances of civil groups and NGOs
- The media is attracted by the campaigns messages and activities and provide extra publicity
- The issue allows you to speak from your experience and expertise and is consistent with your values and vision
- The issue is one where changes will result in real improvements in people's lives.

An effective campaign needs to touch people. It needs to make a connection with its target, strike a chord and prompt a response. It also needs to go beyond touching people to motivate them. An effective campaign convinces its target audience that there is a solution that could remedy the problem that has affected them. The campaign must con-

tain elements that will motivate people and deflect any defeatist or negative thoughts.

Campaigning is all about believing that there can be change to address a problem in the world. And it is about influencing decision makers, at whatever level, to show and then demonstrate their agreement with the campaign's ambitions.

An ideal campaign makes use of all or some of the following:

- A clear message
- A simple solution
- Clear outrage
- Use of the media
- Political support
- Alliances
- Public Action

Part 6: FOCUSING ON OUTCOMES

In addition to setting advocacy objectives, it is important to focus right from the start on what outcomes you want to see, for the following reasons:

- Outcomes reduce the danger of being too activity-focused, ie. objectives can sometimes become a list of 'things we intend to do'. This can lead to a monitoring and evaluation process that only looks at 'whether we did the things we said we'd do'.
- If you are 'outcome-focused' you are much more likely to look at the impact of the activities, rather than the activities themselves.
- It is useful to compare actual outcomes against the anticipated outcomes – the changes are not always what you expected.

Focus on more than policy outcomes or other main change aim of your initiative. Since large scale change is rarely immediate and very difficult to achieve, you need to identify significant shorter term achievements. Important outcomes that can be monitored

include, for example, the extent to which an advocacy initiative has built the capacity of the organizations involved. Strong civil society organizations will be needed to monitor any policy gains and to hold governments accountable for policy implementation.

Outcomes: some factors to measure:

- **Policy gains:** Specific changes in policy, practice and/or institutional reforms.
- **Implementation gains:** the extent to which stated policies are implemented and how these have changed and what impact (or lack of impact) the change has had on the people and communities expected to benefit.
- **Political and democratic gains:** civil groups gain increasing recognition as legitimate actors, the democratic space within which NGOs and other civil groups can work increases, access to governments and other institutions improves, increased respect for human rights including the rights of women, disabled, children, etc., greater freedom of information.

- **Civil Society gains:** the degree to which the capacity of CSOs/NGOs is strengthened; improved cooperation between civil groups; CSOs/NGOs can manage constructively the existence of different perspectives and positions amongst civil groups; CSOs/NGOs have the skills needed to successfully hold governments and international organizations to account.
- **Partnership gains:** advocacy leads to the formation of regional and international networks that can effectively address international institutions and issues of globalization; strong relationships built between groups in the global South and North that erode traditional inequalities and dependencies and form the basis for long term cooperative action.
- **Organizational gains:** increased profile, respect as a credible source of information, increased funding.